

# Framework across all topics and all levels of advice

	A well written record	A less well written record	A poorly written record
<p><b>Understanding (the issue)</b></p> <p><b>'Background / notes' in casebook</b></p>	<p>Record clearly shows:</p> <ul style="list-style-type: none"> <li>• The key facts that are the background information to the issue the client is presenting with.</li> <li>• Key dates</li> <li>• Client capability</li> <li>• Client's goal</li> <li>• What action the client has taken so far</li> <li>• If there is an emergency.</li> <li>• If there are any discrimination issues.</li> <li>• If there are any GVA issues</li> <li>• Any related issues linked to the presenting issue</li> <li>• Any key documents attached to record bought in by client or summary of relevant points from documents</li> </ul> <p>Information in the client profile is not contradictory to information in case records.</p>	<p>Records have partial recording of the requirements for a well written record but sufficient to identify to some extent but not all what advice and next steps would progress the client.</p>	<p>Records have no recording of the requirements for a well written record.</p> <p>Records have insufficient recording of the requirements for a well written record, making it not possible to know what advice and next steps would progress the client.</p> <p>Information in the client profile is contradictory to information in case records.</p>
<p><b>Research &amp; Advice</b> - not applicable to all cases as there will be cases where an adviser might not conduct research such as when signposting to a more relevant organisation</p> <p><b>'Info sources' in Casebook</b></p>	<p>Record clearly shows where information or advice provided to client has been sourced from.</p> <p>Record clearly shows information and advice given to client. Including rights, responsibilities, options, grounds for taking action with pros and cons.</p> <p>Record shows how the information was given to the client is clearly recorded, for example, read out, emailed or printed.</p>	<p>Records show some of the information sources for the advice provided to the client.</p> <p>Records only show website addresses e.g. indexes or home pages and not to specific URLs or breadcrumbs.</p> <p>Records only partially demonstrate the advice given to the client.</p> <p>Extracts from the advice systems are copied and pasted on to the record</p>	<p>Records do not show any of the information sources for the advice provided to the client.</p> <p>Records only show website addresses e.g. indexes or home pages and not to specific URLs or breadcrumbs.</p> <p>Records do not demonstrate any of the advice given to the client.</p>

<p><b>Next steps</b></p> <p><b>'Next steps and Follow on actions' in Casebook</b></p>	<p>Record clearly shows what follow up has been agreed and who will do the follow up actions and by when. Client given date and time of further appointment. If no appointment given, <b>how</b> to contact the local Citizens Advice for further assistance.</p> <p>Record shows that client was made aware of any costs involved in follow up actions and advice on available help with costs.</p> <p>Records show any action undertaken by adviser.</p> <p>Records show client advised how to prepare for further appointment(s)</p> <p>Record clearly shows where client referred or signposted to including opening times and contact details.</p> <p>If client does not agree to any follow up then this is recorded.</p> <p>Copies attached of any documents adviser has helped with or where not possible the record summarises responses in the documents.</p>	<p>Records do not show what all of the follow up actions are or who is responsible for all actions and does not include all deadlines.</p> <p>Details such as costs to client (if appropriate) are partially recorded.</p> <p>Records partially demonstrate the referrals made on behalf of the client or where the client was signposted to.</p> <p>Records show only some contact details provided to client for them to follow up.</p> <p>If next steps not recorded, it is partially clear from the record why next steps were not required.</p> <p>There is partial evidence of copies or written details if practical help given to the client by the adviser.</p>	<p>Records do not show what the follow up actions are or who is responsible for the actions and by when.</p> <p>Detail such as costs to client (if appropriate) are not recorded.</p> <p>Records do not show any of the referrals made on behalf of the client or where the client was signposted to.</p> <p>Record does not show any contact details provided to client for them to follow up.</p> <p>If next steps not recorded, record does not show why next steps were not required.</p> <p>There are no copies or details of practical help given to the client by the adviser (if practical help was given).</p>
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